



# REQUESTOR TRAINING

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# INTRODUCTION

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The purpose of this training guide is to familiarize you with the Requestor role in Bear e-Buy.

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\*Screen shots may differ due to user permissions.

Bear e-Buy is Shawnee State University's e-Procurement product and allows shoppers/requestors to shop for all supplies electronically. Bear e-Buy connects to online vendor catalogs, customized vendor websites, and provides an electronic means of purchasing from our preselected vendors. Bear -Buy also makes department purchases easier, with "one-button" reordering and many other valuable features that make ordering supplies simple and effective.

### Accessing the Application

- 1) Open any web browser, and go to www.shawnee.edu.
- 2) Click on 'Departments,' at the top of the page.
- 3) Click on 'Purchasing.'
- 4) Click  to sign into the application.

Once you click the Bear e-Buy button, you are taken into the application, and your initial log-in will take you directly to your "profile." Click the Home/Shop tab on the far left to be taken to this home screen.

### Site Navigation

The screenshot shows the Bear e-Buy application interface. Red boxes with numbers 1 through 7 point to specific features:

- 1**: Points to the Bear e-Buy logo in the top navigation bar.
- 2**: Points to the search bar in the top navigation bar.
- 3**: Points to the 'Shop' dropdown menu in the main content area.
- 4a**: Points to the 'Showcased Suppliers' section.
- 4b**: Points to the 'Punch-out Suppliers' section.
- 4c**: Points to the 'order' link in the navigation bar.
- 7**: Points to a question mark icon in the 'Punch-out Suppliers' section.

From here, you have several options, which are numbered above with the corresponding details to each below.

- 1) When logging in, check your user information in the upper left hand side of the screen to ensure your name is correctly displayed. (You can check your contact information in the system by clicking “profile.”)
- 2) The quick search function is located at the top, right-hand side of the page. Select the appropriate drop down to search by catalog number, catalog keyword, CAS number, PO, or PR. Clicking the *GO* button will execute the search. Also, right above this search bar is a quick way to get into your active cart. Since the cart in the illustration is empty, it displays ‘Select Draft Cart or Add Item to Cart.’
- 3) You can shop by typing in whatever product you are searching for, and a list of all hosted products will show up, just like a search on Amazon or eBay would display your search output. The search can be refined by using the dropdown and changing it from everything to something more specific like ‘Lab Supplies.’

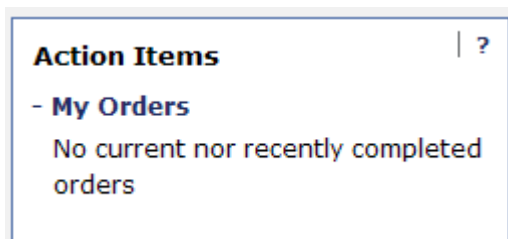
**Note:** If a supplier is not hosted and is a punch-out supplier, the only way to see their products is by clicking on that supplier’s logo and searching through their site.

- 4) Supplier catalogs available through Bear e-Buy are shown in the center of the home page. If you know you want a product from a specific vendor, click that vendor’s logo to see your search options.
  - a. **Hosted Supplier Section.** If you click the vendor’s logo in this section, you are prompted to type a product you are shopping for in a search bar.
    - i. A hosted catalog is an online version of a supplier's printed catalog. Hosted catalogs contain product details with contracted pricing information, if applicable.
    - ii. When you search within Bear e-Buy, products in all of the hosted catalogs are searched. Search results contain product information from all hosted suppliers depending on the search criteria you entered.
  - b. **Punch-out Supplier Section.** If you click the vendor’s logo in this section, you are taken directly into the supplier’s site to shop.
    - i. Once you check out, whatever you have ordered will automatically be pulled back into Bear e-Buy for completion.
    - ii. It is also important to note that not every punch-out experience is the same. Sites vary from supplier to supplier.
  - c. The last option is a non-catalog item order, which is used when you can’t find what you are looking for in any of the catalogs available through Bear e-Buy.

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*Best practice!* It’s always smart to ‘shop at the top,’ by using the search feature (#3 above). This allows you to compare prices among all hosted suppliers. If you don’t find what you want that way, then, try searching on the punch-out suppliers’ websites. Use the non-catalog form, as a last resort.

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- 5) ‘Action Items,’ near the bottom, left-hand side of the home page, shows all your completed requisitions and purchase orders. After you submit the requisition, it will show up here, as a pending requisition, next time you refresh the screen. When the approver approves the order, it will show as a pending PO until the PO is sent to the supplier and to CARS.

- 6) ‘Showcased Services’ is coming soon, and that’s where you will find some of our commonly used campus forms, like the PCard Application, Request for Payment, Overnight Authorization, etc. Simply click on the needed form, fill out the required information, and submit it into workflow, just like a cart.

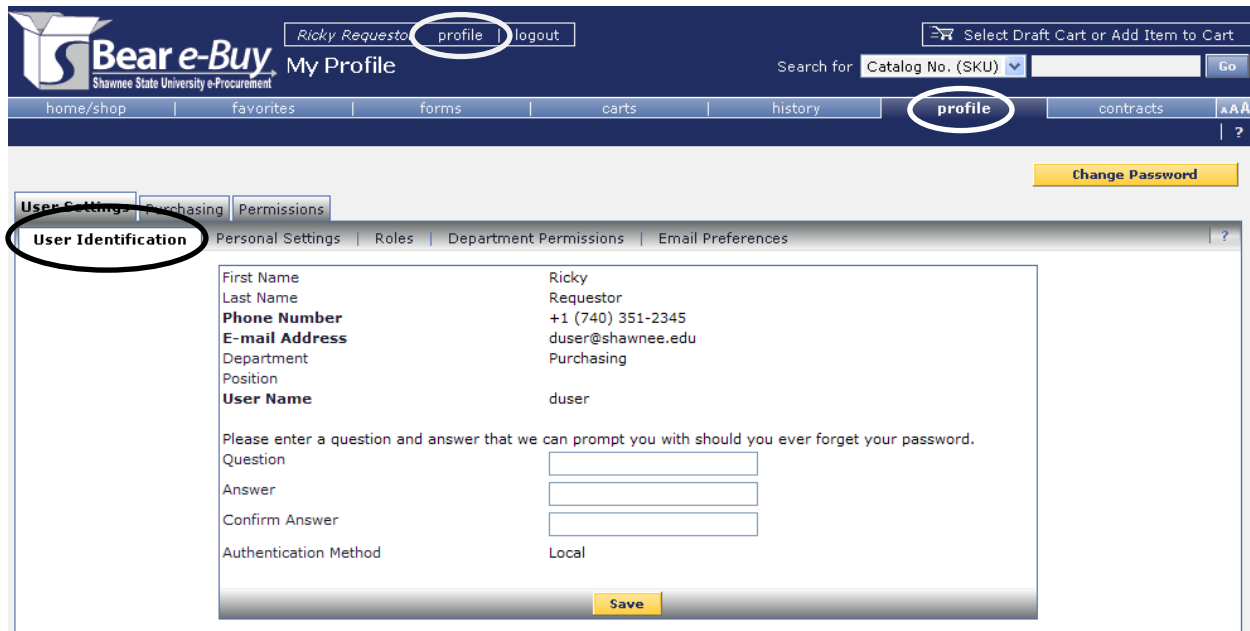
**Important Note:** An individual's approval of a requisition in workflow is equivalent to an approver's signature on a form.

- 7) 'Online Help' is accessed by clicking the question marks that appear throughout the application or by clicking on the hyperlink text.

At any point you can return to the home page by clicking the 'Home/Shop' tab or the  in the top left corner of the page.

## USER PROFILE

Select the Profile Tab in the Navigation Menu to access your user profile. You can also access your profile by clicking the profile link in the application header.



The screenshot shows the Bear e-Buy application header with the 'profile' link circled. Below the header is a navigation menu with 'profile' also circled. The main content area shows the 'User Identification' tab selected, displaying user information for Ricky Requestor, including phone number, email address, department, position, and user name. There are also fields for a security question and answer, and a 'Save' button at the bottom.

First Name	Ricky
Last Name	Requestor
Phone Number	+1 (740) 351-2345
E-mail Address	duser@shawnee.edu
Department	Purchasing
Position	
User Name	duser

Please enter a question and answer that we can prompt you with should you ever forget your password.

Question

Answer

Confirm Answer

Authentication Method Local

User profile screens are grouped into tabs and each tab has its own sub-set of tabs. Information relating to your settings and permissions are found here.

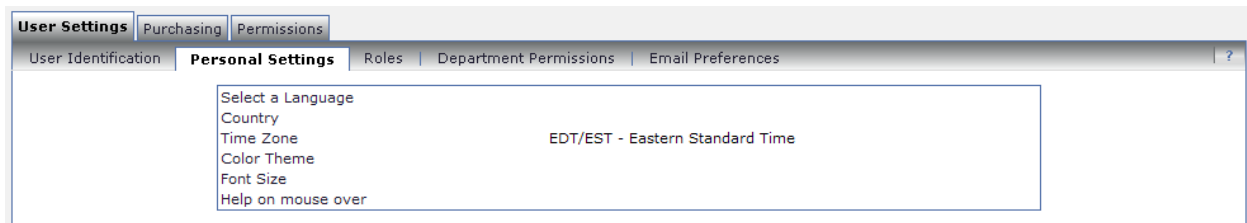
When you access your profile, the User Identification screen will display. The User Settings sub-sets include:

### User Identification

Basic user information such as name and contact information are accessed here.

### Personal Settings

Personal settings include time zone, color themes, and user interface style (displays tabs differently).



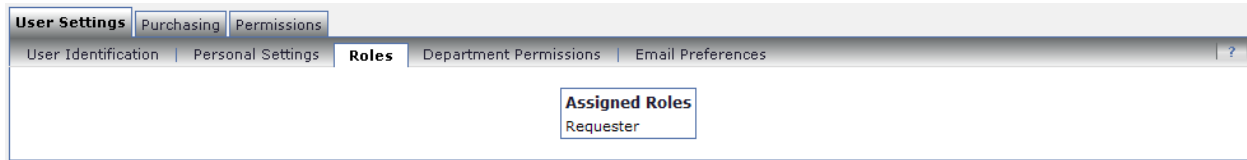
The screenshot shows the 'Personal Settings' tab selected, displaying options for language, country, time zone (EDT/EST - Eastern Standard Time), color theme, font size, and help on mouse over.

Select a Language	
Country	
Time Zone	EDT/EST - Eastern Standard Time
Color Theme	
Font Size	
Help on mouse over	

'User Identification' and 'Personal Settings' have been defaulted to your profile by the system administrator. Send an email to [BeB@shawnee.edu](mailto:BeB@shawnee.edu), if something needs to be changed.

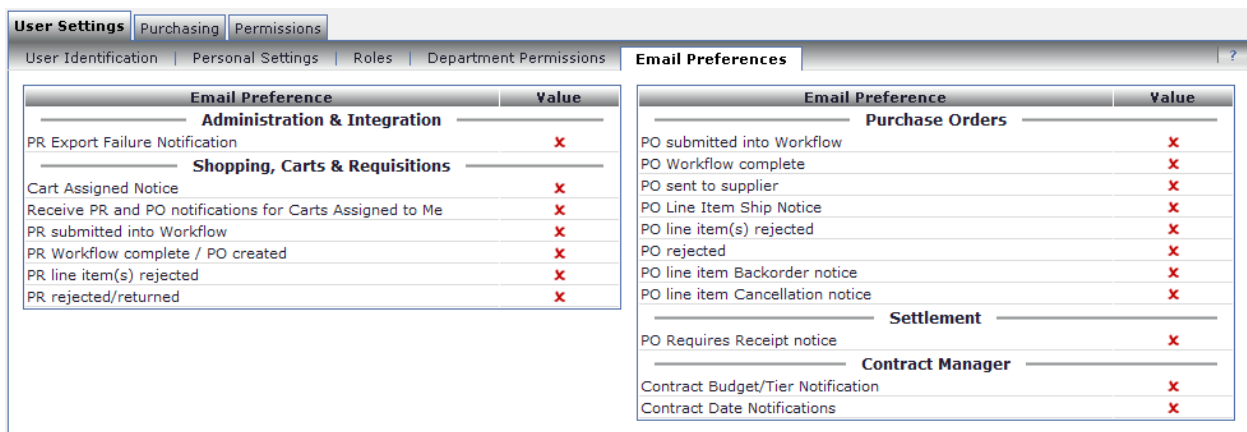
## Roles and Permissions

Please note your roles and permissions are ‘view only’ in Bear e-Buy. Only a system administrator can update this information. You may contact the system administrator at ext. 3460 or by e-mail to [BeB@shawnee.edu](mailto:BeB@shawnee.edu) for a clarification of the roles.



## Email Preferences

The E-mail Preferences screen is used to determine when and why you receive e-mail notifications. Again, please note these settings are defaulted for you. If you prefer something different, you may contact the system administrator at ext. 3460 or by e-mail to [BeB@shawnee.edu](mailto:BeB@shawnee.edu).

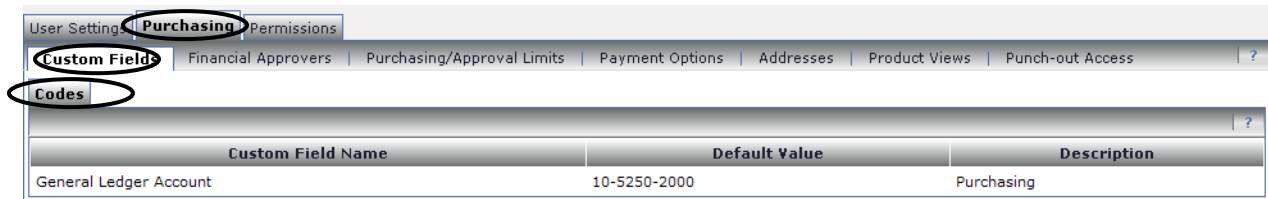


The ‘Purchasing’ tab is next to the ‘User Settings’ tab in your ‘Profile’ and also has several sub-sets. This is where your purchasing defaults are customized, according to your day-to-day activities. Defaults that are correctly set in this area will help you avoid extra clicking, in the long run. Having your defaults turned on allows you to navigate through the system more efficiently.

The system administrator has taken care of your defaults for you; however, if you’d like something changed, please call ext. 3460 or send an email to [BeB@shawnee.edu](mailto:BeB@shawnee.edu).

### Custom Fields

Clicking the ‘Purchasing’ tab should automatically take you to the ‘Custom Fields’ sub-tab and the ‘Codes’ tab, where you’ll find the budget account number to which your purchases will default. This should be the account you use most often. If it isn’t or if that space is blank, please send an email to [BeB@shawnee.edu](mailto:BeB@shawnee.edu) and indicate which account should be used as your default.



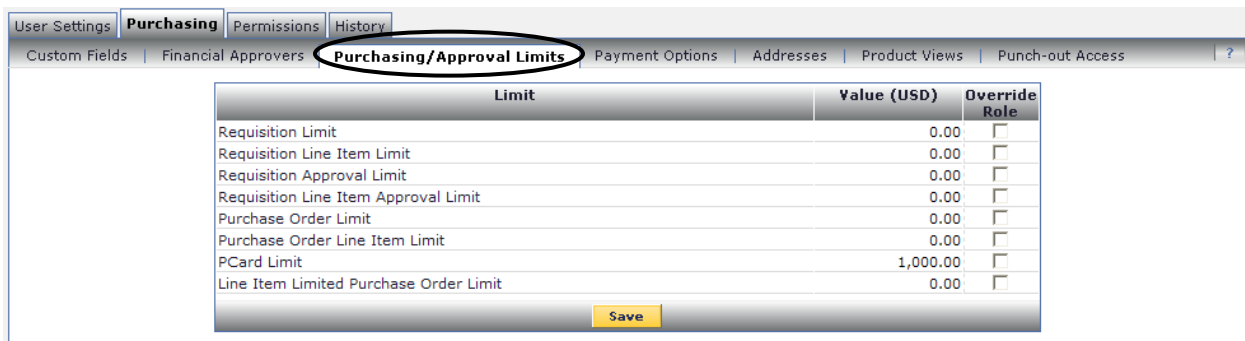
You will note, in the example above, that three pieces of your budget account number are used throughout Bear e-Buy — fund (ex. 10), function (ex. 5250), and project code (ex. 2000). The object code (the piece that’s missing, above) is populated by line item, in your shopping cart, according to the type of item purchased. When shopping from a catalog vendor, the object code defaults automatically, based on the UNSPSC code associated with that item. Object codes must be entered, manually, when ordering via a non-catalog form.

Other accounts from which you’re authorized to order are available to you in your shopping cart. If you’re unable to access an account number assigned to you, please send an email to [BeB@shawnee.edu](mailto:BeB@shawnee.edu).

### Purchasing/Approval Limits

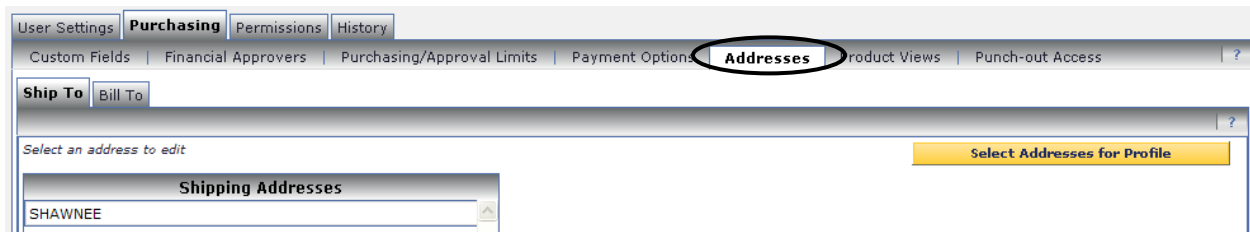
The ‘Purchasing/Approval Limits’ tab will show the swipe limit attached to your PCard. By default, that amount is set at \$1,000. If you’re not a PCard holder, that number does not, of course, apply. It’s just a default number. If you are a PCard holder and your card has a higher swipe limit, it should be reflected here. If it isn’t, please contact the PCard administrator at [pcarson@shawnee.edu](mailto:pcarson@shawnee.edu).

No dollar limit has been assigned to requisitions and purchase orders placed through Bear e-Buy. It is expected that Bear e-Buy will be used for all requisitions and purchase orders, regardless of size.

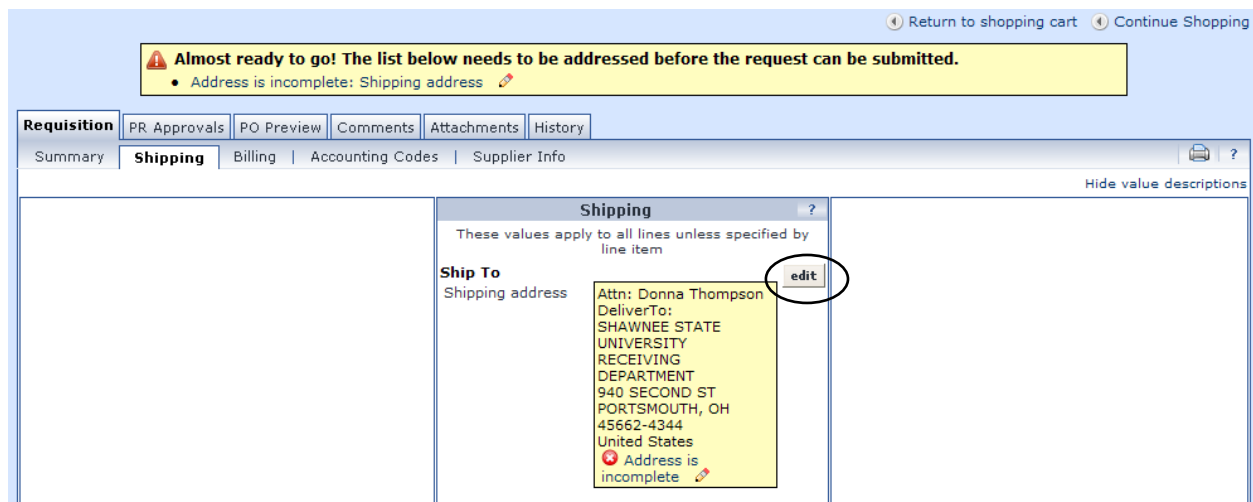


## 'Ship To' Address

The next customizable tab under 'Purchasing' is the 'Addresses' tab.



With one or two exceptions, all users have a 'Ship To' address of 'Shawnee' defaulted to their profile in Bear e-Buy. All requestors must also include a 'Deliver To' address with each order. If a 'Deliver To' address is not attached to the requestor's profile, the requestor will see a screen like the one below, when they check out, and will need to manually enter their 'Deliver To' address each time. To avoid this, send an email to [BeB@shawnee.edu](mailto:BeB@shawnee.edu), and specify the 'Deliver To' address that should be attached to your profile. You should also send an email, if your 'Deliver To' address needs to be changed (i.e., if your department moves from one location to another, if you change positions, or if an incorrect address was attached, inadvertently, to your profile).

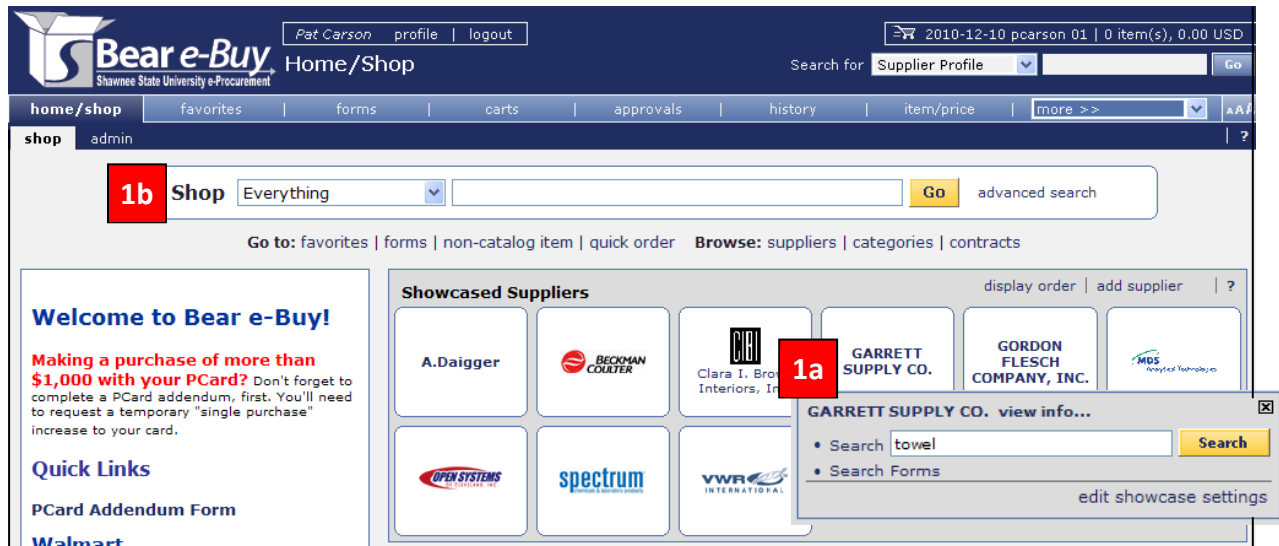


## 'Bill To' Address

The University's 'Bill To' address has been attached to every requestor in Bear e-Buy and can only be changed by the system administrator.

## CREATING A SHOPPING CART

Take advantage of contracted discount pricing by using showcased/punch-out/hosted suppliers displayed on the home page.



There are several ways to initiate a purchase requisition, but all begin at the Bear e-Buy home page.

**OPTION 1: Showcased or Hosted Suppliers'** pricing is determined by contract, membership, or educational discounts. By choosing a showcased or hosted supplier, the requisitioner accesses contracted price files located and maintained on the Bear e-Buy website.

- a) If you know you purchase a specific item from a specific showcased supplier – let's say Garrett Supply – you can click on the supplier's icon on the home page, enter the name of the product you wish to purchase in the box that pops up, and click 'Search.'
- b) If you're not sure which supplier carries the products you're looking for, enter the name of the product in the search box at the top of the page. For best results, leave the drop-down set on its default, 'Everything.' The search will return every similar item that is available from any of the hosted/showcased suppliers (see illustration on next page).
- c) Search results can be filtered by supplier, supplier class, category, packaging unit of measure, and manufacturer name. You can also compare search results or add a specific item to your favorites folder or to your cart (see illustration on the next page).

**OPTION 2: Punch-out Suppliers'** pricing is also determined by contract, membership, or educational discount, but that information is maintained on the supplier's website. Requisitioners will access these special catalogs from the Bear e-Buy home page.

Step 1: Click on the appropriate icon, in the 'Punch-out Supplier' section of Bear e-Buy's home page, to be taken to the supplier's website. Each site will function a bit differently, according to the way they've been set up by the supplier.

Step 2: On the supplier's website, search, select, and add desired product(s) to the cart. Finalize the transaction with the supplier and the system will return your cart to Bear e-Buy, where your selections will be displayed in the Bear e-Buy cart.

Results for: Everything : printer Showing 1 - 20 of 363 results Compare Selected: 0

1c

Filter Results

By Supplier





- A.Daigger (10)
- GORDON FLESCH COMPANY, INC. (1)
- OPEN SYSTEMS OF CLEVELAND, INC. (158)
- Spectrum Chemicals & Laboratory Products (115)
- VWR International (79)

By Supplier Class

- SSU Contract (1)
- IUC Contract (362)

By Category


Products per page 20 Sort by: Best Match Page 1 of 19

	<b>HP LaserJet P1505n printer</b> from OPEN SYSTEMS OF CLEVELAND, INC. Part Number CB413A#ABA Manufacturer Info CB413A#ABA - (HP)	1	223.51 USD EA Add to Cart add favorite   compare
	<b>HP LaserJet P4015n printer</b> from OPEN SYSTEMS OF CLEVELAND, INC. Part Number CB509A#ABA Manufacturer Info CB509A#ABA - (HP)	1	936.75 USD EA Add to Cart add favorite   compare
	<b>HP LaserJet P4015tn printer</b> from OPEN SYSTEMS OF CLEVELAND, INC. Part Number CB510A#ABA Manufacturer Info CB510A#ABA - (HP)	1	1,149.59 USD EA Add to Cart add favorite   compare
	<b>HP LaserJet P4015x printer</b>		1,388.44 USD

2 Punch-out Suppliers

Office/Computer

  
 CDW-G partner

  
 Office Max partner





**OPTION 3: Non-catalog vendor orders** may be placed through Bear e-Buy, when the desired products are not available through hosted or punch-out suppliers.

Bear e-Buy Shawnee State University e-Procurement

Pat Carson profile | logout

2010-12-10 pcarson 01 | 0 item(s), 0.00 USD

Search for Supplier Profile

home/shop favorites forms carts approvals history item/price more >>

shop admin

Shop Everything Go advanced search

Go to: favorites 3a non-catalog item | quick order Browse: suppliers | categories | contracts

- Click 'non-catalog item.' This option allows selection from the University's supplier file. (Important: A supplier must be in the system in order to create a requisition. If a supplier is not found, see 'Request a New Supplier,' on next page.)
- (See illustration on next page.) Enter a string of characters contained in a company name and all associated suppliers with matches to the character string will appear. Highlight and click on the desired supplier.
- Enter product description, catalog number (if known; if not known, enter dashes), quantity, price, and packaging (i.e. 1 dozen, pkg. of 6, etc.)
- Click 'Save and Add Another,' if you wish to order more than one item, or click 'Save and Close,' when you're finished.

Non-Catalog Vendor Order

Enter Supplier **3b**

or  
supplier search

Product Description	Catalog No.	Quantity	Price	Packaging
<b>3c</b> <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> EA

254 characters remaining expand | clear

+ Show product details

Save and Close **3d** Save and Add Another Close

## Request a New Supplier

When a search in Bear e-Buy indicates a supplier is not in the system, an email must be sent to [BeB@shawnee.edu](mailto:BeB@shawnee.edu). Staff in the Purchasing Department will obtain necessary information from the vendor, will enter that information into CARS and Bear e-Buy, and will notify you, when the supplier data is complete.

## REVIEWING, UPDATING, AND SUBMITTING THE CART

When your shopping cart is returned to Bear e-Buy, it will look something like the illustration below.

The screenshot shows a shopping cart for 'Ricky Requestor' with 15 items totaling 102.38 USD. The cart contains three items from GUY BROWN PRODUCTS:

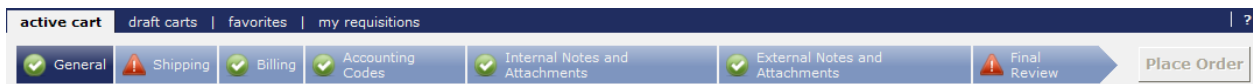
Product Description	Unit Price	Quantity	Total
<b>PPR, MXBRT, 8.5X11 CRTN</b> Item added on Nov 16, 2010 Part Number: P1OM98023-CTN Manufacturer Info: OM98023 - (BOISE CASCADE CORP. -) Object Code: 6110	29.92 USD CT	2	59.84 USD
<b>FLDR, LTR, ASST, 1/3, 100BX</b> Item added on Nov 16, 2010 Part Number: F1OM97666 Manufacturer Info: OM97666 - (HIGHMARK) Object Code: 6110	8.88 USD BX	3	26.64 USD
<b>2011RY OFFICEMAX DSKPD22X17</b> Item added on Nov 16, 2010 Part Number: B1OM03951 Manufacturer Info: OM03951 - (MEADWESTVACO - CONSIGNME) Object Code: 6110	1.59 USD EA	10	15.90 USD

Callouts in the image indicate: 1) Cart name field; 2) 'Add Non-Catalog Item' button; 3) 'Empty Cart' button; 4) 'Continue Shopping' button; 5) 'Add Non-Catalog Item' button on the right; 6) 'Proceed to Checkout' buttons at the top and bottom.

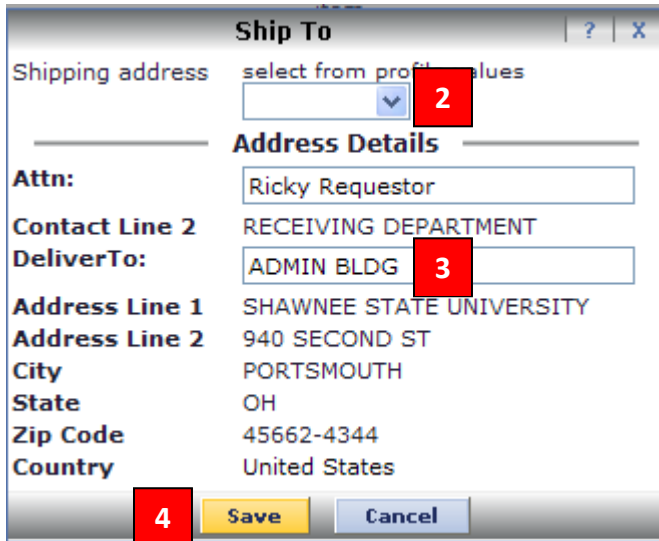
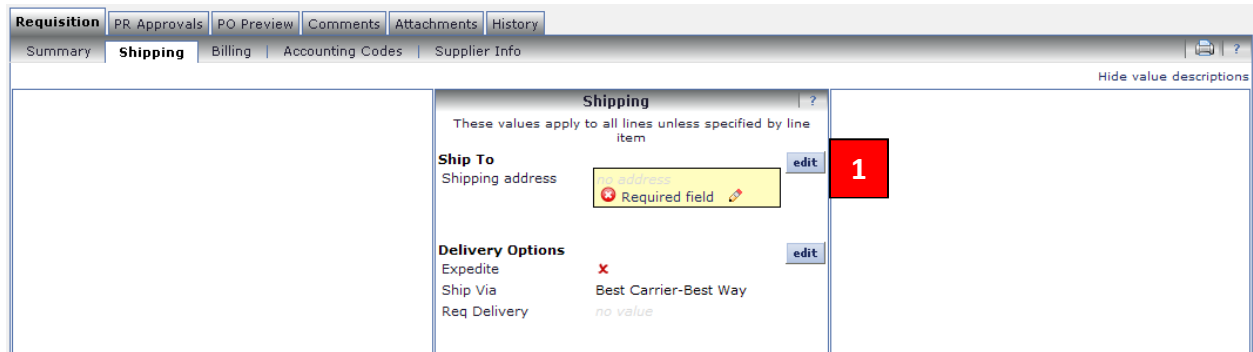
- 1) The first step in the review process — and one you'll find helpful, if you need to refer to the order later — is to rename the cart to something meaningful.
- 2) A non-catalog item may be added to the cart, by clicking the light blue button indicated above.
- 3) Another option is cancel the order by clicking the light blue *Empty Cart* button.
- 4) You could also continue shopping.
- 5) Changes can be made to one or more lines by putting a check mark (or marks) in the box(es) on the right-hand side of the line item(s) and selecting the desired action from the drop-down menu.

This close-up shows the 'Perform an action on 1 item selected' dropdown menu. The menu options are: Add To Favorites, Remove Selected Items, Move to Another Cart, Change Supplier, and Add to Draft Cart or Pending PR/PO. A checkmark is visible in the right-hand column of the first item row in the background.

- 6) When you decide the order is complete, proceed to checkout by clicking the big yellow 'Proceed to Checkout' button at the top or the bottom of the screen.



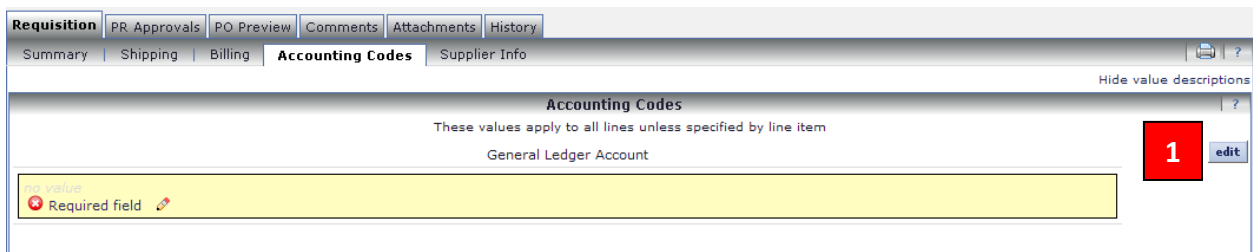
Throughout the checkout process, the banner shown above will appear at the top of your cart and will be a quick reference to where you are in the order process. Bear e-Buy validates your cart for completion of cart details and, if necessary, prompts you to correct/edit appropriate fields. A green checkmark indicates that step is complete. A red exclamation point indicates something is missing.



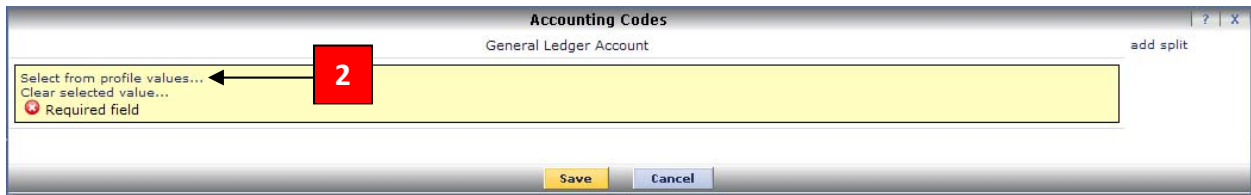
### How to edit the 'Ship To' address

- 1) Click the light blue 'edit' button in the 'Shipping' field.
- 2) Select the appropriate shipping address from the drop down menu (usually 'Shawnee').
- 3) Fill in or edit the 'Deliver To': line.
- 4) Click the yellow 'Save' button at the bottom of the screen.

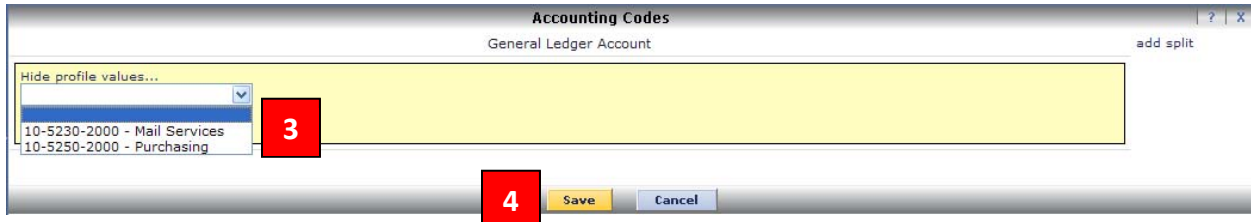
### How to edit accounting codes at the header



- 1) Click the light blue *edit* button in the 'Accounting Codes' field.



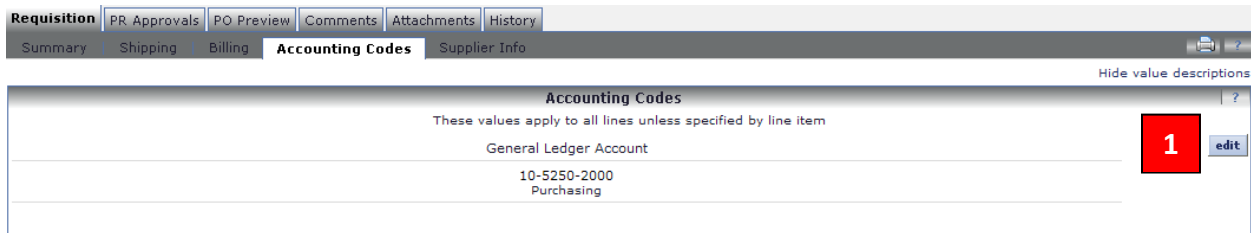
- 2) Click 'select from profile values ...'



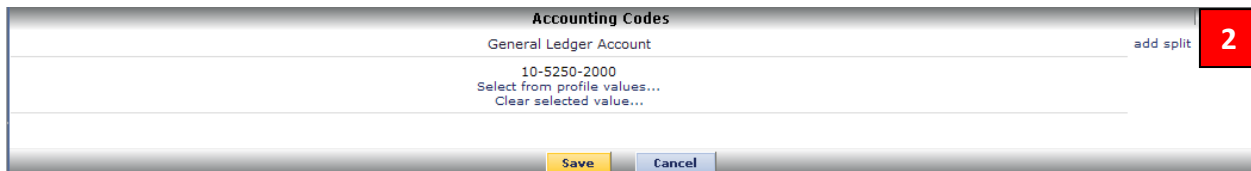
- 3) Select the account you wish to use from the list that appears. If the account you're looking for is not available to you, send an email to the system administrator at [BeB@shawnee.edu](mailto:BeB@shawnee.edu), requesting that it be added to your profile.
- 4) Click the yellow 'Save' button at the bottom of the screen.

### Splitting accounting codes at the header:

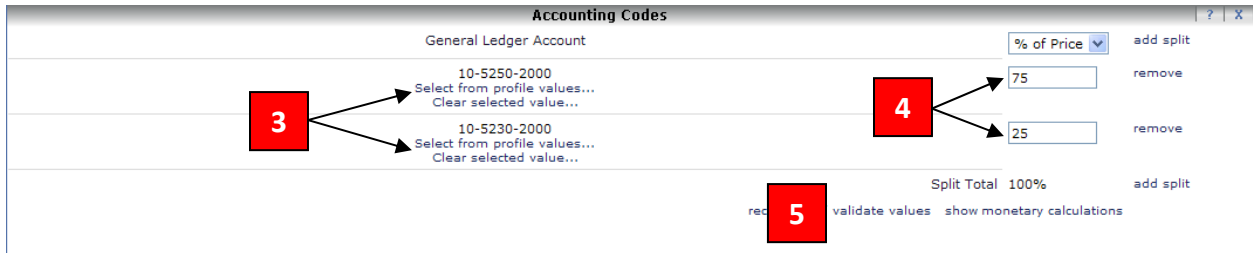
You have the option — before submitting your requisition — to edit accounting codes by adding splits at the header or at the line. When splitting at the header your only option is to split by Percent of Price. Below is an example of how to split an order at the header by Percent of Price.



- 1) Click the light blue 'edit' button in the 'Accounting Codes' field.



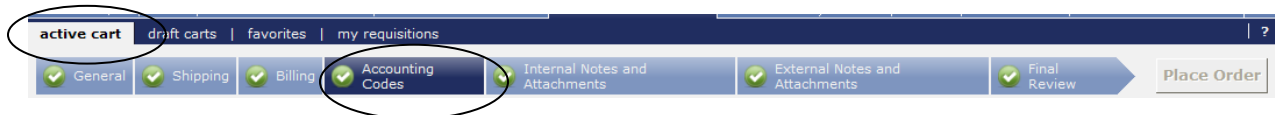
- 2) Click 'add split' on the next screen that appears. You may add as many splits as you wish, by clicking this link.



- 3) Click 'Select from profile values,' and choose the accounts you wish to use from the drop down menu.
- 4) Enter the percentages in the boxes at the right.
- 5) You may also click 'validate values' to ensure the numbers you entered total 100%, or click 'show monetary calculations,' if you'd like Bear e-Buy to show you the dollar amount of the split. When you're finished, click the yellow 'Save' button at the bottom of the screen.

### Splitting accounting codes at the line

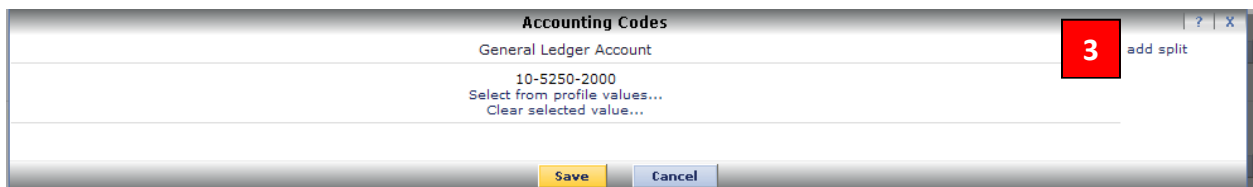
When splitting at the line you have the option of splitting an individual line item by 'Percent of Price,' 'Amount of Price,' or 'Amount of Quantity.' Below is an example of how to split a line by 'Amount of Price.'



You must be in an active cart and at the 'Accounting Codes' step in the review process.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 PPR,MXBRT,8.5X11 CRTN <a href="#">more info...</a>	P10M98023-CTN	CT	29.92	2 CT	59.84 USD
Accounting Codes (same as header)					<input checked="" type="checkbox"/>
					<input type="button" value="edit"/>

- 1) Place a checkmark in the box to the right of item you wish to split.
- 2) Click 'edit.'

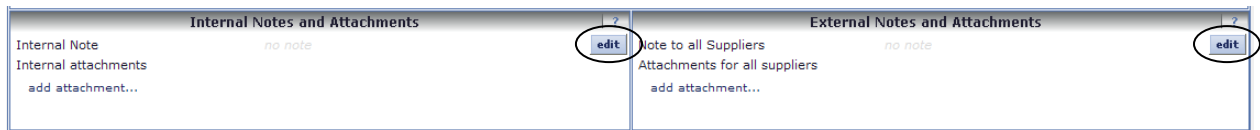


- 3) Click 'add split.'



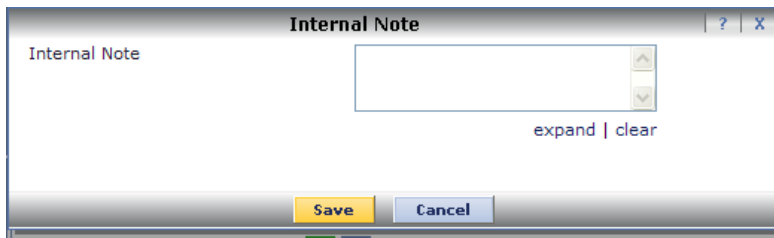
- 4) Select ‘% of Price,’ ‘Amount of Price’ or ‘Amount of Qty’ from the drop down menu on the right.
- 5) Enter the percent or amount in the boxes on the right.
- 6) Click ‘recalculate / validate values’ on the right to ensure the splits equal the total.
- 7) Click the yellow ‘Save’ button at the bottom of the screen.

## Adding internal and external notes and attachments



Internal notes and attachments may be added in the left-hand section (shown above) and will be seen only by the folks on campus, as your requisition travels through the approval process.

External notes and attachments may be added in the right-hand section and may be viewed on campus, but will also go to the vendor, along with your purchase order.



To add a note, click on the light blue ‘edit’ button, type your note, and click *Save*. The size of the note box can be adjusted by clicking the word ‘expand’ under the box. The box will accommodate 1,000 characters.

**To add an attachment** (either a file or a link), click ‘add attachments’ (see illustration above), select the type of attachment from the drop down menu, type in the ‘file/URL name’ (as you wish it to appear), ‘browse’ to the document you want to attach and enter the URL, and click ‘Save.’

## Changing the object codes

Object codes are automatically defaulted to each line of a requisition associated with a catalog vendor, according to the UNSPCS code for the item purchased. Many times those object codes will be correct; however, there are times they will need to be changed, before the requisition is submitted for review.

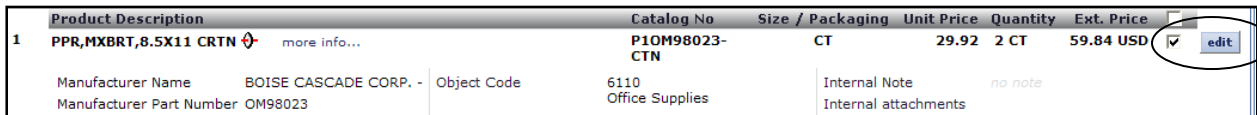
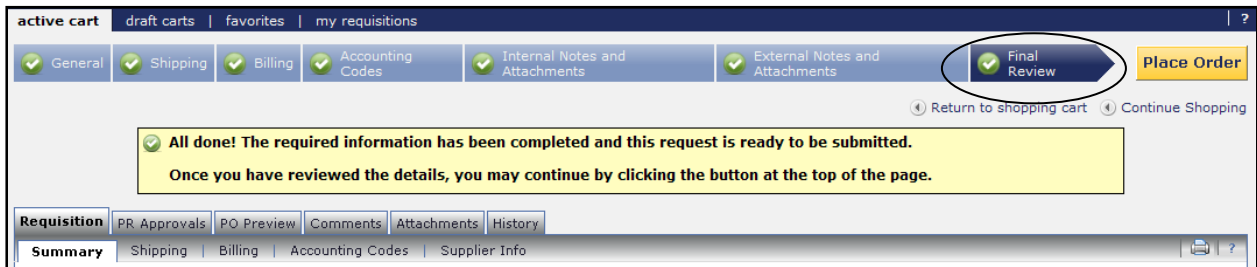
To change the object code, you must be in the shopping cart (before proceeding to checkout) or at the ‘Final Review’ step (prior to placing your order). Both options are illustrated below.

### Shopping cart example:

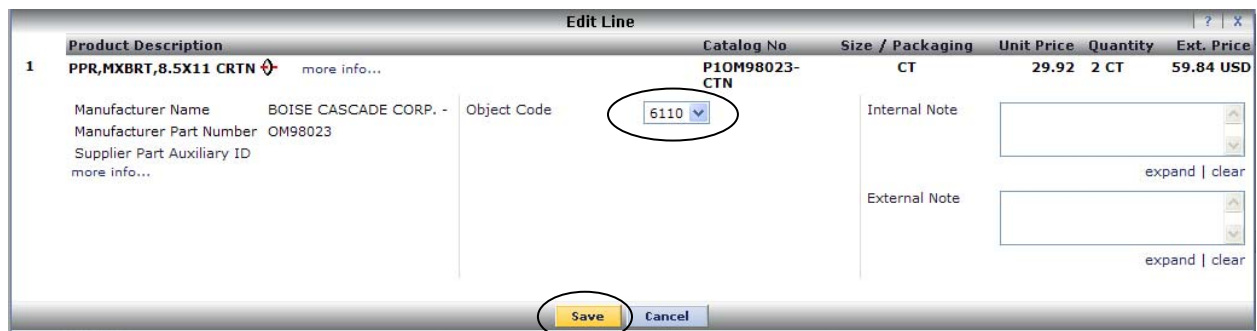
Product Description	Unit Price	Quantity	Total
Item added on Nov 16, 2010 <b>PPR, MXBRT, 8.5X11 CRTN</b> Part Number P10M98023-CTN Manufacturer Info OM98023 - (BOISE CASCADE CORP. -) Object Code <b>6110</b>	29.92 USD	2	59.84 USD

Select the correct object code from the drop down menu, before clicking the yellow 'Proceed to Checkout' button at the top or bottom of the screen.

### Example of Final Review step



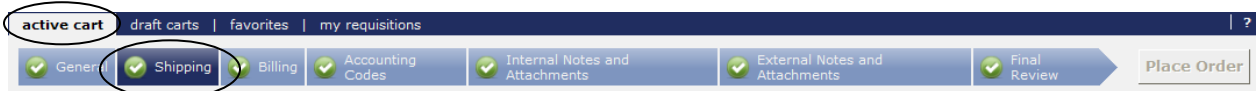
Place a checkmark in the box to the right of the item you wish to change. Then, click the light blue 'edit' button.



Select the correct object code from the drop down box in the middle of the screen, before clicking the yellow 'Save' button at the bottom.

### Splitting 'Ship To' addresses at the line level

In some instances, you may be ordering multiple lines and need to send different line items to different locations on campus. Whatever 'Ship To' address you pick at the header will carry down to all of the line items. Below is an example of how to split a 'Ship To' address at the line level.



You must be in an active cart and at the 'Shipping' step in the review process.

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 PPR, MXBRT, 8.5X11 CRTN  more info...	P10M98023-CTN	CT	29.92	2 CT	59.84 USD

Ship To (same as header) **1**

**2**

- 1) Place a checkmark in the box to the right of the item whose address you wish to change.
- 2) Click 'edit.'
- 3) Enter a new campus address on the 'Deliver To' line.
- 4) Click the yellow 'Save' button at the bottom of the screen.

**Ship To** ? X

Shipping address

---

**Address Details**

**Attn:**

**Contact Line 2** RECEIVING DEPARTMENT

**DeliverTo:**  **3**

**Address Line 1** SHAWNEE STATE UNIVERSITY

**Address Line 2** 940 SECOND ST

**City** PORTSMOUTH

**State** OH

**Zip Code** 45662-4344

**Country** United States

**4**

## Removing items from a cart

Bear e-Buy allow items to be removed from shopping carts, either individually or all at once — whether from a hosted catalog order or a punch out order.

Follow these steps to remove selected items from a cart:

- 1) Navigate to the shopping cart with the item(s) you want to remove.
- 2) Select the item(s) you wish to remove by placing a check in the checkbox at the right.
- 3) Choose 'Remove Selected Items' from the drop-down list of available actions and click 'Go.' Bear e-Buy will remove the selected item(s) and will update the cart totals.

Follow these steps to remove all items from a Cart:

- 1) Navigate to the shopping cart with the item(s) you want to remove.
- 2) Choose 'Remove All Items' from the drop-down list of available actions and press 'Go.'
- 3) A confirmation popup will open. Choose OK to remove all of the items or cancel to stop the process.
- 4) If you choose OK, Bear e-Buy will remove all of the items.

## Updating items in the cart

Once products have been added to your shopping cart, it may be necessary to change some of the information such as quantity or unit price.

Follow these steps to update the quantity of an item from a hosted catalog:

- 1) Open your shopping cart with the hosted catalog item in question.
- 2) In the 'Quantity' field modify the desired quantity.
- 3) Click the 'Update' button under the quantity box, and the extended price, on the right, and the totals at the bottom of the page will both update with the revised amounts.

## Submitting the Requisition

Bear e-Buy validates your cart for proper completion of cart details and, if necessary, will prompt you to correct/edit appropriate fields.

The screenshot shows the 'Draft Requisition' page for user Pat Carson. A yellow message box states: "All done! The required information has been completed and this request is ready to be submitted. Once you have reviewed the details, you may continue by clicking the button at the top of the page." Below this is a summary table with three columns: General, Shipping, and Billing. The 'PR Approvals' tab is circled in red.

General	Shipping	Billing
Cart Name: 2010-11-18 pcarson 01	Ship To: Attn: Pat Carson, RECEIVING DEPARTMENT, DeliverTo: ADMIN 167	Bill To: Accounts Payable, Shawnee State University, 940 Second Street
Description: no value		
Priority: Normal		

Before submitting your requisition, you may wish to click the *PR Approvals* tab to see who will be approving your order based on the budget account number you entered.

The screenshot shows the 'PR Approvals' workflow diagram. It starts with 'Submitted' and proceeds through three stages: 'Department Approvals', 'General Ledger Account', and 'Create PO'. Each stage has a 'view approvers' link circled in red. The workflow ends with 'Finish'.

The workflow will vary, depending on the items in your cart, the budget account charged, and the amount of the purchase. Click the 'View Approvers' link and the corresponding group of approvers' names will display.

Click the yellow 'Place Order' button at the top right of your cart to submit your order into workflow.

**Requisition Information** ?

 **Congratulations! You have successfully submitted your request. If you need to view or print a copy, click [Quick View](#) or view its status on the Approvals Tab.**

Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page.

Requisition number	460000 <a href="#">view</a>
Requisition status	Pending
Cart name	2010-10-22 dschwamberge 01
Requisition date	12/6/2010
Requisition total	1,237.52 USD
Number of line items	2

What would you like to do next? Here are links to some common actions.

- [Search for another item](#)
- [View order history](#)
- [Check the status of an order](#)
- [Return to your home page](#)
- [Create new draft cart](#)


Now it is up to the approvers in workflow to ensure the order is released.

Clicking on 'view' will show you the current status of the order, which can also be found from searching the history.

**Requisition** | PR Approvals | PO Preview | Comments | Attachments | History






**Summary** | Shipping | Billing | Accounting Codes | Supplier Info

Hide header

General	Shipping	Billing
<p>Status  Pending Department Approvals</p> <p>Submitted 12/6/2010 5:14 PM</p> <p>Cart Name 2010-10-22 dschwamberge 01</p> <p>Description <i>no value</i></p> <p>Priority Normal</p> <p>Prepared by Debra Schwamberger</p>	<p><b>Ship To</b></p> <p>Attn: Debra Schwamberger            DeliverTo: UNIVERSITY OUTREACH            SHAWNEE STATE UNIVERSITY            RECEIVING DEPARTMENT            940 SECOND ST            PORTSMOUTH, OH 45662-4344            United States</p> <p><b>Delivery Options</b></p> <p>Expedite <b>X</b></p> <p>Ship Via Best Carrier-Best Way</p> <p>Req Delivery <i>no value</i></p>	<p><b>Bill To</b></p> <p>Accounts Payable            Shawnee State University            940 Second Street            Portsmouth, OH 45662-4344            United States</p> <p><b>Credit Card Info</b></p> <p>No credit card has been assigned.</p> <p><b>Billing Options</b></p> <p>Accounting Date 10/22/2010</p>

[View/edit by line item...](#)

Status key:

-  = pending approval
-  = completed
-  = withdrawn
-  = pending, but line item(s) rejected
-  = approved, but line item(s) rejected

**Special Note:**

After approval by the Budget Manager, orders that are under \$1,000.00, are placed with hosted and punch-out suppliers, and are charged to accounts '10' and '20' are forwarded to the supplier. Orders that do not meet the criteria above proceed through the normal workflow.

## Copying Previous Requisitions to a New Cart

You can easily copy an old requisition to a new cart to re-order the line(s). Items can be removed or additions can be made as well, when in the cart. This procedure is commonly done when orders are rejected or there is a problem with the order.

The screenshot shows the Bear e-Buy interface with the following details:

- Header: Debra Schwamberger profile | logout | Select Draft Cart or Add Item to Cart
- Search: Search for Catalog No. (SKU) [ ] Go
- Navigation: home/shop | favorites | forms | carts | **1** history | profile | contracts
- Sub-navigation: PO History | PR | **2** my requisitions | my purchase orders
- Buttons: New Search | Select Query | Save Query
- Results: Requisition(s) meeting the search criteria: 79. Page 1 of 8. Legend ?

Status	Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
	19533733	LAKESHORE LEARNING MATERIALS	SUPPLIES FOR PES	Schwamberger, Debra	12/6/2010 1:56 PM	531.51 USD
	19512614	AG PRINTPROMO SOLUTIONS	IMPRINTED PENS	Schwamberger, Debra	12/3/2010 2:59 PM	1,280.00 USD
	19512340	WALMART	VIDEO CAMERA	Schwamberger, Debra	12/3/2010 2:52 PM	200.00 USD
	19478083	ORIENTAL TRADING COMPANY	SUPPLIES FOR PWES	Schwamberger, Debra	12/2/2010 11:20 AM	95.08 USD
	19477399	S & S WORLDWIDE	SUPPLIES FOR PWES	Schwamberger, Debra	12/2/2010 11:13 AM	325.89 USD

Follow these steps to copy a previous requisition to a new cart:

- 1) Access the History tab.
- 2) Click the 'My Requisitions' sub-tab and choose the appropriate requisition **OR**;

The screenshot shows the Bear e-Buy interface with the following details:

- Navigation: PO | **3** PR History | my requisitions | my purchase orders
- Buttons: Select Query
- Search Filter: by PO No. | **4** by Requisition
- Form Fields: Requisition Name, Requisition No., Supplier Name, Catalog No. (SKU), Filter (checked), Results per page (10)
- Buttons: Select Supplier, Search

- 3) Click on PR History, perform a 'By Requisition' search, and click on the appropriate requisition number within the search results.

The screenshot shows the Bear e-Buy interface with the following details:

- Navigation: PO History | **4** PR History | my requisitions | my purchase orders
- Buttons: Available Actions: Copy to New Cart | Go
- Requisition Summary: Requisition | PR Approvals | Comments | Attachments | History
- Summary: Shipping | Billing | Accounting Codes | Supplier Info

General	Shipping	Billing
Status:  Completed (12/3/2010 3:44 PM)	Ship To: Attn: SANDY HAMER, PORTSMOUTH WEST ELEMENTARY SCHOOL	Bill To: Accounts Payable, Shawnee State University
Submitted: 12/2/2010 11:20 AM		

- 4) Select 'Copy to New Cart' from the 'Available Actions' drop-down box in the top right, and click 'Go.'

A new shopping cart is created and all line item(s) and requisition information are copied to the new cart. You will be directed to the 'Edit Cart' section of the new cart.

**Note:** This action may not work with products that were ordered through a punch-out catalog. Some suppliers require you to go back into their site to re-order.

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## Deleting and creating shopping carts

Bear e-Buy has no restrictions on how many draft shopping carts can be created. And, when a shopping cart is no longer needed, Bear e-Buy allows you to delete the entire shopping cart with one click.

Follow these steps to delete a draft shopping cart:

- 1) Click the shopping cart icon in the upper right-hand corner of the screen to access the active cart.
- 2) Select the draft carts sub-menu under the carts main menu to access the list of existing draft carts.
- 3) Find the cart you wish to delete and click the 'Delete' button on the right-hand side of the screen.

Follow these steps to create a new/draft shopping cart:

- 1) Click the carts tab on the main menu.
- 2) Click the 'Create Cart' button in the upper left to edit your new cart's name and description.

## ADDING ATTACHMENTS / COMMENTS (after an order is submitted into workflow)

---

Follow these steps, if a requisition/PO needs to have a document or note attached after it has been submitted into workflow.

- 1) Find and open the requisition/PO to add comments or attachments.
- 2) Select 'Add Comment' from the drop-down in the upper right and click 'Go' to open a separate window (shown below).

You can select who will see this comment once it is added by sending them an email notification. Pat Carson's name is displayed because she was an approver in this example. Had someone else been required to approve this order, their name would be displayed as well. If you need anyone outside of the workflow to see the email, simply click the 'add email recipient' link to add any users necessary.

**Note:** Make sure you check the box next to the names you want to receive the email notification.

- 3) After the appropriate names are selected, browse to attach your file, and click 'Add Comment.'

**Add Comment**

This will add a comment to the document. If you select a user they will receive an email indicating that a comment has been added to the document.

**Email notification(s):**

Pat Carson (Prepared by) <pcarson@shawnee.edu>  
add email recipient...

1000 characters remaining expand | clear

**Attach file to this document (optional):**

Attachment Type: File

File Name:

File:

**Note:** Comments added after a PO or requisition is entered into the workflow can only be seen by SSU.

You can view attachments and notes tied to a PO or requisition, by clicking on the 'Comments' sub tab, when you are in that PO or requisition.

## HISTORY

The history tab can be used to check on the status of requisitions and purchase orders. After you click history, several search options are available to you.

The screenshot shows the Bear e-Buy Purchase Requisition Search interface. The navigation bar at the top includes 'home/shop', 'fav', 'forms', 'carts', 'approvals', '1 history', 'item/price', and 'more >>'. The 'PR History' tab is selected (2). The search options are set to 'by Requisition' (3). The search form contains fields for Requisition Name, Requisition No., Supplier Name, and Catalog No. (SKU) (4). A 'Filter' checkbox is checked (4). The 'Results per page' is set to 50. A 'Filters' section includes radio buttons for 'My Orders', 'My Submitted Orders', 'Company Orders', and 'Orders I Reviewed'. The 'Start Date' is 12/01/2010 and the 'End Date' is 12/07/2010 (5). There are 'Search' and 'Request Export' buttons.

In this example, we are looking up the status of a requisition by PR History

- 1) Click the history tab.
- 2) Since we are looking up the status of a requisition, we click 'PR History' (Purchase Requisition History). If we wanted the status of a PO we would click 'PO History,' instead.
- 3) Specify if you are searching 'by PO number' or 'by Requisition.' Since we are searching a requisition, click 'by Requisition.'
- 4) If you know the requisition name or number, type it in on the corresponding line. If you do not know the number you will have to use the filters in order to find the requisition. Place a checkmark in the filter box in the middle of the screen, in order to filter your search. If you do not check this box you will not be able to use the filter options.
- 5) Once you check the filter box, all of your search options are available to use. This screen shot only shows the first few options, but there are several other ways to refine the search. Perhaps the easiest to use is the date range. Select a date range and click search to show all requisitions that were made during that time period. You can go into further detail by selecting who prepared the requisition, or if you know the status, you can filter the search by PR Status:
  - a. Completed
  - b. Pending
  - c. Partially Rejected
  - d. Rejected
  - e. Withdrawn

## PR Search by Requisition

Purchase requisitions (PRs) created in Bear e-Buy can be found by using either the requisition name or number in your search criteria. You can search for a single requisition or a group of requisitions.

Follow these steps to search for a PR by requisition:

- 1) Go to the 'History' navigation tab.
- 2) Select the 'PR History' sub-menu.
- 3) Click the 'By Requisition' tab.
- 4) Enter the requisition number in the 'Requisition No.' field **OR**;
- 5) If you know part of the name of the requisition, enter it in the 'Requisition Name' field. The search results will include all PRs that start with the text entered in the field.
  - a. You may click on the 'Filter' checkbox and enter information in any of the available fields.
- 6) If you want to save your search, click the 'Save Query' button, after performing the search. You will be prompted to name your query.

## PR Search by PO Number

Purchase requisitions (PRs) generated in Bear e-Buy can be found by using purchase order information, as well. You can either search for a single requisition or a group of requisitions, based on your search criteria.

Follow these steps to search for a PR by PO number:

- 1) Go to the 'History' navigation tab.
- 2) Select the 'PR History' sub-menu.
- 3) Click the 'by PO No.' tab. If you know the PO number, you can search by this number; otherwise, you can search several other ways from this point. Your first step will always be to click the 'Filter' checkbox. Then, select from the following, as appropriate:
  - a. My Orders or Company Orders
  - b. Start Date and End Date
  - c. User
  - d. PR Departments
  - e. PR Status
- 4) Click the 'Search' button, and your results will display.
- 5) From the PR search results screen, you can do the following:
  - a. Click the 'New Search' button to perform a new search.
  - b. Click the 'Save Query' button to name and save your search criteria.
  - c. Click the 'Select Query' button to run a saved query.

## PO Search by PO Number

Purchase orders created in Bear e-Buy can be located by using various PO details, and you can search for one PO or many.

Follow these steps to search for a purchase order by PO #:

- 1) Go to the 'History' navigation tab.
- 2) Select the 'PO History' sub-menu.
- 3) Click the 'by PO No.' tab.
- 4) Enter the PO number in the 'Purchase Order No.' field **OR**;
- 5) Click the 'Filter' checkbox.
- 6) Enter your search criteria and click the 'Search' button. Your search results will display.
- 7) If you want to perform a new search, click the 'New Search' button.
- 8) If you want to save your search criteria, click the 'Save Query' button.
- 9) If you want to run an existing query, click the 'Select Query' button.

## PO Search by Supplier/SKU

Purchase orders created in Bear e-Buy can be located by using the supplier name and/or SKU number. You can search for a single PO or a group of POs, as well.

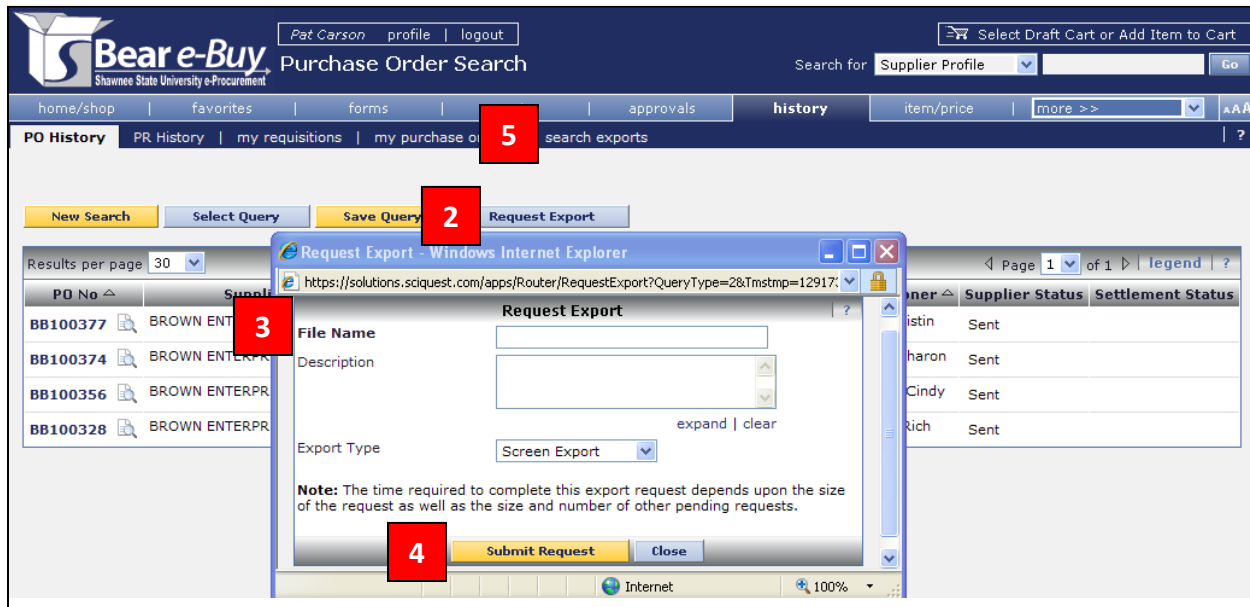
Follow these steps to search for a PO by supplier or SKU:

- 1) Go to the 'History' navigation tab.
- 2) Select the 'PO History' sub-menu.
- 3) Click on the 'By Supplier/SKU' tab.
- 4) If you know the supplier, enter the full name of the supplier in the 'Supplier Name' field or click the 'Select Supplier' button to locate a supplier.
- 5) If you know the SKU number, enter that information in the 'Catalog No. (SKU)' field **OR**;
- 6) To search by means other than supplier or SKU, click the 'Filter' checkbox.
- 7) Enter your search criteria.
- 8) Click the 'Search' button, and your PO search results will display.
- 9) If you want to perform a new search, click the 'New Search' button.
- 10) If you want to save your search criteria, click the 'Save Query' button.
- 11) If you want to run an existing query, click the 'Select Query' button.

## Search Exports

Bear e-Buy allows you to export data after you have performed any of the searches described in the preceding pages. Three types of exports are available to you:

- 1) **Screen Export** — Exports the information available on the search results screen.
- 2) **Transaction Export** — Exports an expanded set of information.
- 3) **Full Export** — Exports all information.



Follow these steps to export purchasing data:

- 1) Perform one of the searches described in the preceding pages.
- 2) From your search results window, click the 'Request Export' button. A pop-up window will display.
- 3) Fill in the fields.

**Note:** The 'File Name' field is required, and it is best to give your export a meaningful name.

- 4) Click the 'Submit Request' button. Note that the size of your export will affect the time it takes to run your export.
- 5) Click the 'Search Exports' sub-menu and locate your export.
- 6) When the Export Status is 'Completed' you can view your export.
- 7) To access your export, click on the file name.
- 8) You will be asked if you want to 'Open' or 'Save' your data. Files are created in .csv format, but should be saved as.xls (Excel) format.

## MANAGING FAVORITES

Setting up 'Favorites' in Bear e-Buy can help you save time when shopping for items you purchase frequently. Within Bear e-Buy there are two types of 'Favorites.' 'Personal Favorites' and 'Shared Favorites.' With 'Personal Favorites,' folders and sub-folders can be created and managed. You have full control over your 'Personal Favorites' settings; however, you do not have the ability to make any changes to 'Shared Favorites.'

If you would like folders/items added to the 'Shared Favorites,' you need to contact the system administrator at BeB@shawnee.edu, and they can set up the folder for you and specify which roles, users, or departments should have access. Please note that items from a punch-out catalog should not be added to favorites. Punch-out suppliers require you to go to their site every time you want to order their items.

### Add Items to Favorites

To add products to 'My Favorites' from search results:



- 1) Search for products using the various product search tools available in Bear e-Buy.
- 2) On the search results page, click 'add favorite' on each line you want to add to 'Favorites,' and the screen shown below will display.

**Add To Favorites**

**Step 1: Edit Item Details**

**Item Nickname**      **Quantity**  
ACCLAIM® C-FOLD TOWEL WHITE      1

from GARRETT SUPPLY CO., Catalog No. JAM20603  
Add Description

**Step 2: Select Destination Folder**

New

- Personal
  - Custodial Supplies
- Shared
  - Office Supplies

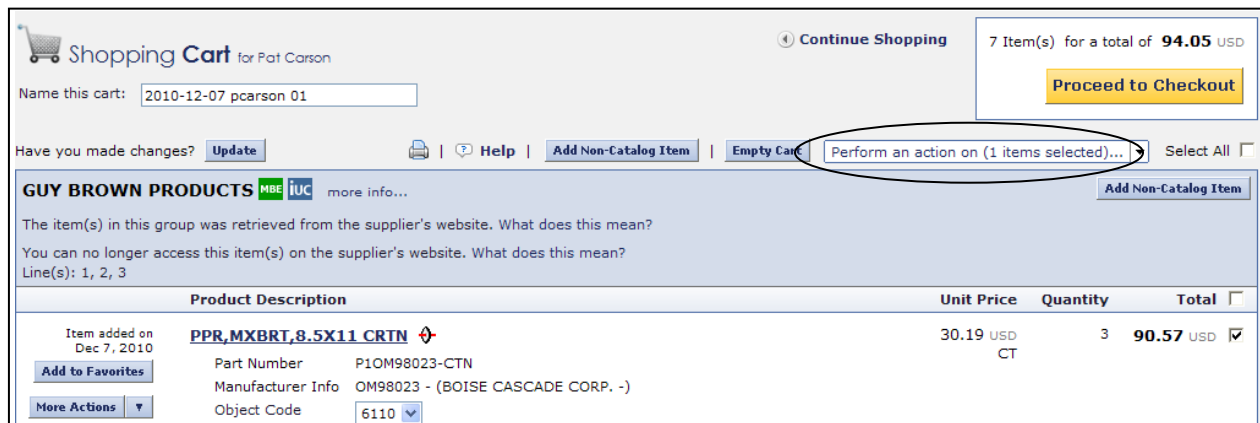
Submit      Cancel

- 3) The 'Add to Favorites' popup window is used to determine what folder the item(s) will be placed in and what they will be labeled as.

**Note:** If multiple items are selected, they will all go into the same folder. In addition, if an item requires a new folder, add the folder into the 'Favorites' section (by clicking 'New' on the above screen) and then add the product.

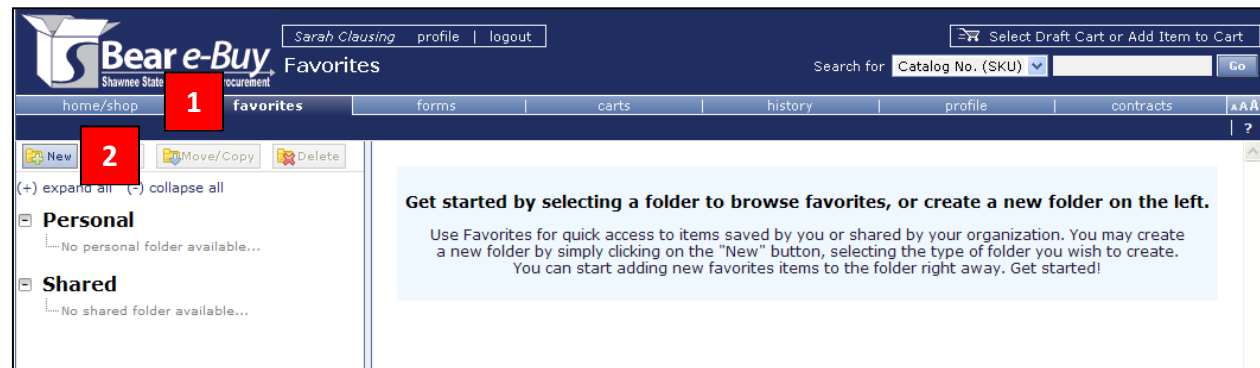
- 4) If necessary, edit the product's 'Item Nickname' and set the default 'Quantity,' as you wish, to store in 'Favorites.'
- 5) Click 'Submit' or 'Cancel.'

### To add products from the shopping cart to *Favorites*:



- 1) Shop for items and place them in your cart.
- 2) Access your cart.
- 3) From the cart review page (see above), choose the item(s) you want to add to 'Favorites' by placing a check in the checkbox to the right of the item.
- 4) Select 'Add to Favorites' from the drop-down list and the pop-up window shown and described on the previous page will appear. Follow steps 3, 4 and 5, above.

### Creating Favorites Folders and Sub-Folders



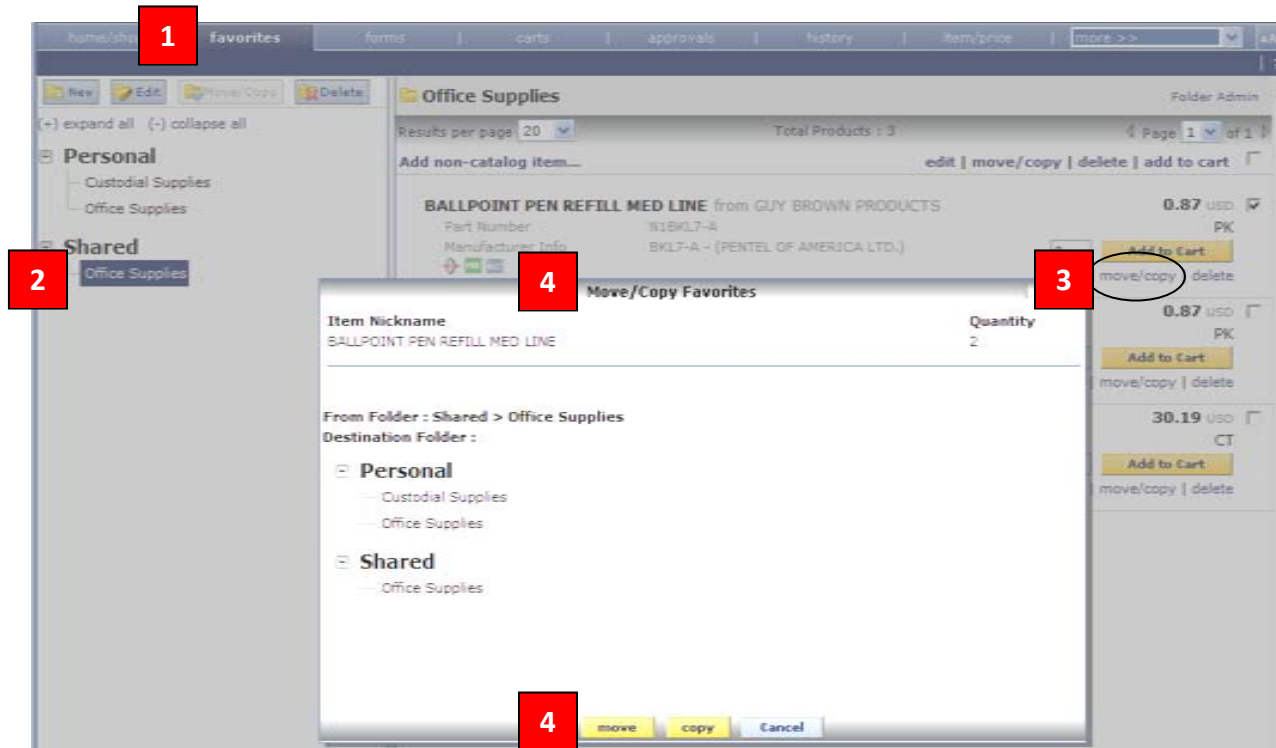
'Favorites' utilize the 'Folder/Subfolder' feature, meaning that you can create folders and add subfolders in those folders.

Follow these steps to create a new folder or subfolder in 'Favorites' (see illustration on previous page):

- 1) Select the 'Favorites' tab in the navigation menu.
- 2) Select the New Folders button.
  - a. If you have not made a folder yet, your only option will be to add a 'Top level personal folder.'
  - b. Once you have folders made, the 'Subfolder of selected folder' option will become available.
- 3) 'Create New Personal Favorites Folder' will pop up and prompt you to name and describe the folder.
- 4) Name your folder and click 'Save.'

## Move /Copy Favorites between Folders

This feature can be used when you need to move or copy a product from one favorite to another.



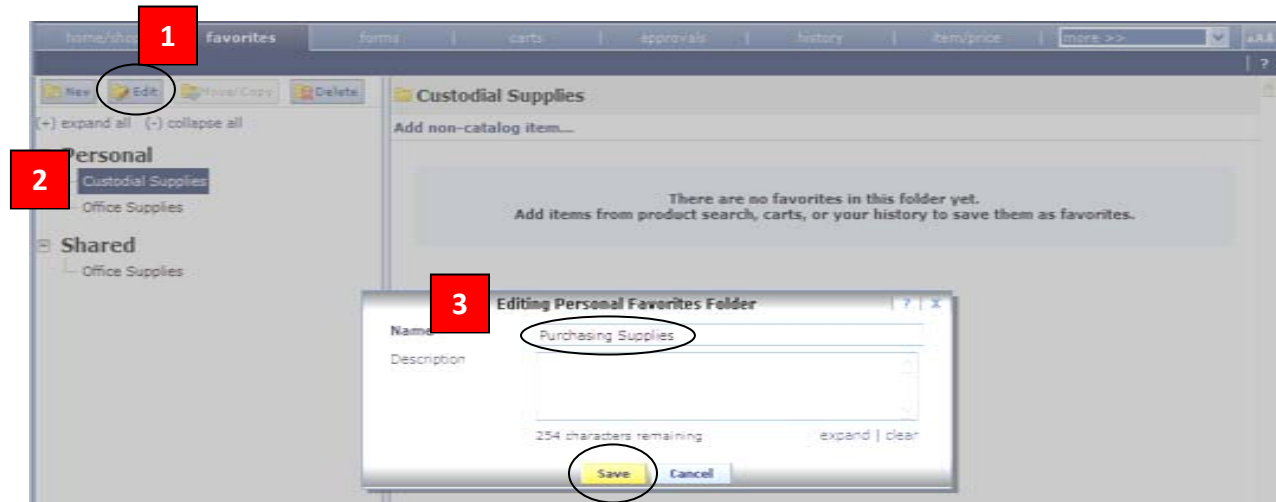
Follow these steps to copy or move a folder (or subfolder) in 'Favorites':

- 1) Select the 'Favorites' tab in the navigation menu.
- 2) Navigate to a folder with items in it.
- 3) To select the item you want to copy, click the 'move/copy' button on the line you want to move.
- 4) The 'Move/Copy Favorites' pop-up opens, as seen above. Select the 'Destination Folder' and click 'move' or 'copy' depending on what you want.

**Note:** The move/copy feature is only available when you have products in a 'Favorites' folder.

## Edit Favorite Items and Folders

You can edit the name or quantity of your 'Favorites' folders.



To edit the name of a 'Favorites' folder:

- 1) Navigate to your favorites folders.
- 2) Select the folder you want to edit and click the "Edit" button.
- 3) The 'Editing Favorites Folder' pop-up opens. Update the folder name and click the 'Save' button.

To edit a 'Favorites' item's name or quantity:

- 1) Navigate to your 'Favorites' folder that has the items requiring edits.
- 2) To edit an item, click the "edit" link on that item's line, and the 'Edit Folder Favorites' pop-up opens.
- 3) Update the 'Item Nickname' or 'Quantity' and click the 'Submit' button.

## Adding Favorite Items to the Cart

The 'Favorites' function allows you to store items that are referenced or ordered on a regular basis. After you add items to 'Favorites,' you can add them to your shopping cart, with just a few clicks.



To place *Favorites* in your shopping cart:

- 1) Navigate to your 'Favorites' folders and locate the item(s) you wish to place in your cart (see above).
- 2) **To place individual items in your cart** — Confirm the quantity indicated is correct or change to desired quantity, and click the yellow 'Add to Cart' button on the right.

- 3) **To place multiple items in your cart** — Confirm or change the quantities indicated, check the checkboxes to the right of the items you wish to order, and click the 'add to cart' link near the top of the screen.
- 4) **To place ALL items in your cart** — Confirm or change the quantities indicated, put a checkmark in the checkbox to the right of the 'add to cart' link near the top of the screen, and click the 'add to cart' link.